

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2014-2015

Quarter: 1

PSA: 1

Provider: Legal Services of Northern California

Counties: Humboldt, Del Norte

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 2

Provider: Legal Services of Northern California

Counties: Shasta, Siskiyou, Modoc, Trinity, Lassen

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 3

Provider: Legal Services of Northern California

Counties: Butte, Colusa, Glenn, Tehama

Optional Success
Story(ies)/Case Summary(ies)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 4

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Fiscal Year: 2014-2015

Quarter: 1

Provider: Legal Services of Northern California

Counties: Nevada, Placer, Sierra

Optional Success
Story(ies)/Case Summary(ies)

July 2014

None.

August 2014

Mrs. W. found herself in a skilled nursing home after being released from a hospital for a UTI. Mrs. W had suffered from temporary delirium due to the UTI- not an uncommon occurrence in people over 70 years old. As she recovered and made plans to return home, she learned that her family had terminated her rental agreement, shut off her utilities and removed all her belongings from her apartment. The family had called her chore worker and told her that Mrs. W was never coming home. The family insisted they were going to place Mrs. W in an assisted living facility [a facility in another county far from her friends, established medical providers and support services] where she could be watched at all times "for her own good." One family member falsely reported that Mrs. W had attempted suicide and that she would do so again if she was allowed to return home. Mrs. W confronted her family who told her that she was demented and could no longer make her own decisions. They threatened to never let her see her grandchildren if she didn't agree to do what they said. LSNC talked to Mrs. W's landlord and found out that her family had submitted a notice terminating their mother's tenancy alleging she was demented and could not live on her own. The landlord agreed that it was not too late to rescind the notice and was happy to speak to Mrs. W. about returning to her apartment. LSNC demanded that the family return all the furniture they had taken – including Mrs. W's piano. Mrs. W contacted her chore workers on her own and made arrangements for care when she returned home. After a week of making arrangements and confirmation from her doctor that she was well enough to return home, Mrs. W. returned to her home.

Mr. A is a disabled retired veteran and owner of a mobile home in a small mobile home park. Mr. A has an IHSS chore worker who comes to his home a few times a week to do his laundry and cleaning. On one occasion, Mr. A had a medical appointment at the VA that took longer than usual. He returned home to find that his chore worker had entered his home, cleaned his home and finished his laundry. She had taken his trash out for him as well. Mr. A was pleased with the good service. Mr. A had given his chore worker permission to come into his home and do her job if he was gone. A few days later, he received a notice from the Park's attorney threatening him with eviction because he was a "nuisance." The manager alleged that he was allowing someone to live with him in violation of the rules of the Park and that this person was dumping her personal trash in the community trash bins. LSNC met with Mr. A and with his house keeper. LSNC advised them both that the allegations would not likely support an eviction since Mr. A had a right to employ a housekeeper and his housekeeper did not use the Park trash bin for disposal of her personal trash. The manager had jumped to conclusions and never asked Mr. A before making the unfounded allegations. LSNC helped Mr. A write a response to the Park's attorney stating the facts and demanded a retraction of the Notice threatening eviction. As a result, Mr. A. enjoys his home, understands his rights and employs the same housekeeper.

September 2014

None.

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Optional Information on
Collaboration with Other
Advocacy Groups

July 2014

Met with representatives from the Nevada County 211 program and provided information on services provided by LSNC in Nevada County.

August 2014

None.

September 2014

None.

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Provider: Sacramento Senior Legal Services

Counties: Sacramento

Optional Success
Story(ies)/Case Summary(ies)

A widowed senior living alone contacted Senior Legal Hotline to see if she had any legal rights regarding a power of attorney she had issued to a family member. The widow was concerned that the family member was abusing his rights and financially exploiting her. The widow wanted to know if she had any legal right to check on how he was spending her money. The Senior Legal Hotline attorney advised the widow of her rights to examine all receipts and records, provided the widow with the law that provides her with this right, and advised the widow on steps she can take to protect herself from financial elder abuse and exploitation. As a result of Senior Legal Hotline's assistance, the widow is empowered to assert her rights before the family member and protect her finances.

A very low income senior with disabilities contacted Senior Legal Hotline for help with a pension question. The senior had been told that he wasn't entitled to any pension benefits from his former employer. The senior had tried to contact the company but because of his disabilities, he had been unable to do so. A Senior Legal Hotline attorney researched the company and the successor company, tracked down the responsible party and requested a reason behind the denial of the senior's pension. After a long period of communication with the company, the company admitted that the senior was owed a pension for his decades of work with the company. As a result of Senior Legal Hotline's representation, the senior is now receiving the pension he earned during his years of work. The small pension will help the senior pay for medical bills, groceries and utilities.

A very low income, 75 year old widow contacted Senior Legal Hotline because she was concerned with joint property and debt that her recently deceased husband had left her. The widow needed legal advice on the steps she would have to take to transfer the small, family home and car into her name. She also wanted to know how she could handle her deceased husband's debt as she was not able to afford payments given small, fixed income of Social Security and Veterans Benefits. The Senior Legal Hotline attorney advised the widow on the steps she could take to transfer title of her property and send the widow copies of the appropriate legal forms. The attorney also advised the client on her rights and responsibilities regarding her deceased husband's debts. As a result of Senior Legal Hotline's timely assistance, the widow was able to transfer the joint property into her name and have peace of mind about her deceased husband's debts.

Optional Information on
Collaboration with Other
Advocacy Groups

of this, 141.6 representation, 901.6 assistance
Community education and advocacy: 72.2 hours

Legal services hours: 1115.4;

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Provider: Yuba Sutter Legal Center

Counties: Sutter and Yuba

Optional Success
Story(ies)/Case Summary(ies)

Legal assistance hours for the quarter include 277.50 for Sutter County and 246.25 for Yuba County (523.75 total). Legal representation hours include 33.75 for Sutter County and 32.75 for Yuba County (66.50 total). Grand total of service units for the 1st quarter of FY 14/15 total 590.25 hours.

The community education activities were three for Sutter County with 6.50 hours and one for Yuba County with 1.50 hours (8.00 total).

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

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Fiscal Year: 2014-2015

Quarter: 1

Provider: Legal Services of Northern California

Counties: Yolo

Optional Success
Story(ies)/Case Summary(ies)

LSNC assisted a 70 year old disabled woman in obtaining a refund from a motel. She paid cash for one month in a mote, but on the second night of her stay, someone entered her room while she was sleeping, damaged her property and frightened her. The room lacked adequate security measures and also had serious habitability problems. She left the motel because of the incident but the manager refused to provider her with a refund. She contacted LSNC and the attorney assigned to her case was able to obtain a refund for the days she did not stay at the motel, enabling her to secure other housing options.

Client is a 73 year old homeowner who deeded his home to himself and his step-son. He lives in the home with his step-son and his step-son's wife and three children. Client entered into an agreement with the step-son agreeing to pay the mortgage, half of the taxes and half of the utility bills. Client feels it is unfair to pay all the mortgage and half of the taxes and utility bills since he is a single person using less of the home. He is also on a fixed income while his step-son still works. He contacted LSNC after his discussions with his step-son's wife went poorly. Since he lives in the home, he wanted to maintain the peace. LSNC intervened by assisting the client with negotiations regarding expenses for the home. The parties agreed to amend the agreement so that the client pays the mortgage, the step-son's family pays the taxes, and they split the utility bills. The agreement was acceptable to all parties and they were able to resume a peaceful living environment.

Client was denied unemployment insurance benefits after he was terminated for not working on a day he was not scheduled to work. The Employment Development Department determined he had been terminated for misconduct and not eligible for benefits because the employer claimed he was a "no call, no show." He contacted LSNC for assistance. LSNC assisted the client in appealing and represented the client at administrative hearing. The Administrative Law Judge found that he had worked for company for many years and frequently filled in on weekends for his supervisor. His supervisor had asked him to fill in again on a weekend that he was scheduled to be out of town. He told him he could not make it and was then terminated the next day he was scheduled for being absent from work without permission. Under these circumstances, he was absent for a justifiable reason and he properly notified the employer of his inability to work, so his conduct does not constitute misconduct. He was found entitle to unemployment insurance benefits.

Optional Information on
Collaboration with Other
Advocacy Groups

LSNC staff holds office hours at the following locations:
Esparto: 1st Thursday of the month, every other month at RISE;
West Sacramento: 4th Thursday of the month at the Senior Center;
Knights Landing: 4th Tuesday of the month, every other month at Center for Families (formerly YFRC);
Winters on the 1st Wednesday of the month, every other month at RISE;
Davis on the 1st Monday of the month at Grace in Action (housed at the United Methodist Church).
In addition, LSNC attends monthly meetings of the Multi-Disciplinary team with APS, DESS, and other advocates for older adults. LSNC also participates in regular meetings of the Yolo County Health Aging

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Alliance (YHAA) and chairs the YHAA Collaboration Subcommittee with other Yolo County senior providers, including the Food Bank, Elderly Nutrition Program, Adult Day Health Center, Supervisor Provenza's staff, Yolo Hospice, Department of Employment and Social Services, Veteran's Services, and representatives from the three Senior Centers. Legal Representation: 73.30 Legal Advice/Assistance: 189.50 Community Education: 18.50 Special Outreach: 0 Total Hours: 281.30
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PSA: 5

Provider: Legal Aid of the North Bay

Counties: Marin

Optional Success
Story(ies)/Case Summary(ies)

Our Client secured her housing through a program that placed individuals seeking housing and employment, with families/individuals seeking a live-in caregiver. Client is a female, 70 years old, with limited social security income. Through the program, Client was placed in a home where she would render caregiver services, but did not receive any wages in lieu of not having to pay rent. Client worked for her landlord/employer for approximately 8 months, but informed her landlord/employer that she could no longer continue to work the hours she was working without pay. The parties agreed that Client's employment and tenancy would end, but unfortunately, because Client was not paid any wages, she did not have the financial resources to obtain new housing. As a result, Client was served with an eviction lawsuit. Legal Aid of Marin assisted Client by helping her prepare a pro-per Answer to the lawsuit and encouraged her to contact an employment attorney regarding a possible wage claim. In addition, Legal Aid of Marin assisted the Client through a Mandatory Settlement Conference Program, sponsored by the Court and Legal Aid of Marin, which assist pro-per litigants settle their eviction cases prior to trial. Through the settlement conference, Client was able to get additional time to vacate, as well as \$9,500, divided into two payments (one prior to her vacate date, and one upon vacating), so that Client would have the financial resources to move-out before her vacate date.

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 6

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Quarter: 1

Provider: Asian Pacific Islander Legal Outreach

Counties: San Francisco

Optional Success
Story(ies)/Case Summary(ies)

Our case involves a 60 year-old woman originally from China who is a monolingual Cantonese speaker. She has her permanent residency card but is not a citizen. Her husband had already been living here for decades. He had a house and two children who are now adults. When the client was married, it never occurred to her that it made a difference whether the house had her name on it or not. She had lived a very simple life and did not expect much except to live a quiet life with her husband. Life was fine for a while, but after her husband retired, he became controlling and volatile. He would throw dishes at her and knock over chairs. He started controlling her by giving her a minimal allowance. She had to use the allowance to buy all food and household items for the two of them. Two years ago, she became ill and her husband started complaining about the costs of her health care. Three months ago, she heard her husband talking to his children about how she was becoming a burden and they needed to do something. When she confronted him, her husband pushed her against the wall and put his hands around her neck threatening to squeeze and choke her if she did not stay quiet.

As with other times, she never told anyone or called the police. Her husband left shortly afterwards and did not come back. A month later, she received papers. She did not know what any of it meant but eventually with help from a caseworker, she learned he had filed for divorce and requested that she move out of the house in 30 days. She kept receiving documents and discovery from husband's attorney. She could not read these documents and did not know what to do. Eventually, she came to us with her caseworker. Unfortunately, she had little or no right to stay in the house, beyond certain spousal obligations to provide for basic needs. She did not want a restraining order. We were able to help her with a plan and a response and court filings to make sure she had spousal support, more time to look for housing, and coverage for moving costs.

Optional Information on
Collaboration with Other
Advocacy Groups

This quarter, we met and discuss many issues of high concerns that have impacted our senior community. They include but not limited to scam attacks on senior dealing with credit card and tax fraud. Most recently, there was a case in Chinatown in which a senior was told that her son will die if she does not take all her financial funds and jewelry to be blessed. The senior was afraid that she turned over \$80,000 worth of property. The SFPD are now investigating the matter. This prompted discussion among the community based organizations (CBOS) to regularly do credit reports checks.

We also discussed the housing evictions amongst targeted communities of color, immigrants and seniors and how to go about educating.

Finally, we discussed the tax preparer fraud. There are tax return preparers who defraud taxpayers and the United States Treasury by inflating income, deductions, credits, or withholding without the taxpayer's knowledge, with the goal of increasing the overall amount of the taxpayer's refund and diverting all or a portion of the refund to an account or debit card under the preparer's control. We urge all CBOS to be on the lookout in these matters.

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Provider: Legal Assistance to the Elderly

Counties: San Francisco

Optional Success
Story(ies)/Case Summary(ies)

Client is a 74-year-old Hispanic woman who lives in subsidized housing South of Market. She had been served with a summons and complaint in an unlawful detainer case based on the behavior of her two sons, who lived with her and the allegation that they were not authorized tenants. We represented her and settled the case on the day of trial, with her sons agreeing to move out.

Optional Information on
Collaboration with Other
Advocacy Groups

In September, we submitted a collaborative proposal to the San Francisco Mayor's Office on Housing along with Bay Area Legal and the Homeless Advocacy Project of the Bar Association of San Francisco. The three agencies all sought additional funds to support attorney positions dedicated to eviction defense representation. The proposal was funded and work will start during the last half of October. We are in the process of hiring two additional attorneys totaling 1.6 FTE who will serve elderly and disabled clients facing eviction.

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Quarter: 1

Provider: La Raza Centro Legal, Inc.

Counties: City & County of San Francisco, CA

Optional Success
Story(ies)/Case Summary(ies)

July Client: A monolingual Spanish speaking senior came to our Senior Law Clinic because he didn't know how to change the beneficiaries of his group insurance death proceeds. When he first got the insurance, he named his oldest son as the primary beneficiary. Unfortunately, his oldest son passed away and our client did not know how to change beneficiaries. He made several phone calls requesting information on how to change beneficiaries but he was unable to get any information over the phone. We called Prudential Financial INC., and requested the Group Insurance Beneficiary Designation/Change Form and helped our client to fill it out. With our help, he was able to change the beneficiary of his insurance.

August Client: A senior sought legal help at our Senior Law Clinic after she got a fix-it ticket because one of the brake lights on her car was out. She got the citation signed by a police officer and paid the dismissal fee. On the same day, she took the signed ticket with proof of correction to the court along with the dismissal fee and a month later she got a notice saying that she has to pay \$179 for the above referred citation plus \$300 for civil cost. The client didn't know what to do. She doesn't have any money because she lives from her disability benefit. She was so desperate because the day she came in looking for help was the deadline on her ticket and if she didn't pay on time, her driver license was going to be suspended. We called the Traffic Division of the San Francisco Superior Court and we found out that the citation was paid. There was a computer problem that didn't show the payment our client made. Client left our office with a big smile and said that we saved her life.

September Client: A Spanish speaking senior came to La Raza Centro Legal's Senior Law Clinic with an overpayment from the Social Security Administration for the amount of \$18,000. Apparently, she has a bank account that exceeds the resources a person is allowed to have in the bank account based on the SSI rules. She didn't know she has a bank account until her daughter told her that she included her in the account as joint owner. We set up an informal conference with the Administration and explained the caseworker assigned to the case that she never used the money in the account or deposit anything into it. We proved that the money in the account was from the client's daughter job. We submitted documents to prove the information we told the Administrations and the client's daughter signed the STATEMENT OF CLAIMANT OR OTHER PERSON certifying that she opened the account on her name and her mother's name without the client's authorization. After this, the Administration waived the overpayment and reimburse our client the money the Administration was withholding every month to pay back the overpayment

Optional Information on
Collaboration with Other
Advocacy Groups

During this past quarter we were able to set a full calendar of presentations for seniors around the city during the summer and early fall. We keep participating actively at the Latino Partnership with monthly meetings at the 30th Street Senior Center where we share point of views and talk about common issues. Likewise, but keep collaborating with the Senior Rights Bulletin by providing pertinent articles for seniors and providing proofreading and editing for the Spanish version of it.

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Finally, we collaborate actively with the Legal Aid Association of California, Senior Law Chapter in both the Steering Committee and the Languages Access Committee. Our goal is to provide our input in sensitive and crucial legal issues of interest for seniors.

**Provider: Asian Americans Advancing Justice -
Asian Law Caucus**

Counties: San Francisco

Optional Success
Story(ies)/Case Summary(ies)

A monolingual Chinese-speaking couple came to our office for assistance with their SSI benefits. The couple had \$6,000 in their bank account because the husband did not know to ask for discontinuation of another local cash benefit he was receiving, CAPI (Cash Assistance Program for Immigrants). The Social Security Administration found the couple over their resource limit and discontinued their benefits for almost 6 months. During the 6 months, rent was not paid and the couple received a written notice from their landlord asking them to leave because of unpaid rent. We represented the couple and their benefits were reinstated without any overpayments. Also, they were able to retroactively receive their benefits for the months SSA did not pay them. The couple used the money to pay back their landlord for the rent payments that were missed and is happy to know they do not have to move.

Optional Information on
Collaboration with Other
Advocacy Groups

N/A

PSA: 7

Provider: CONTRA COSTA SENIOR LEGAL SENIOR SERVICES

Counties: CONTRA COSTA

Optional Success
Story(ies)/Case Summary(ies)

An 83 year old client from Hercules, widowed and living alone, consulted us about her neighbors. They were demanding that she remove a tree on her property and have the roots trimmed at her own expense. Our client had numerous expenses relating to her health and could not afford to remove the tree, in addition to the facts that it was healthy and not posing a hazard. We advised the client that she had no duty to remove the tree and suggested that she offer to allow the neighbors to remove it and contribute to the expense. However, the neighbors became demanding and insisted that she bear the expense of removal. Staff at CCSLS wrote a letter outlining the duties of a homeowner regarding trees and overhanging branches and roots. We demanded that the neighbors quit bothering the client and direct any further concerns to our attentions. The neighbors ceased their constant haranguing and the client expressed relief for being informed of her rights.

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 8

California Legal Services (Title III B)
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Quarter: 1

Provider: Legal Aid Society of San Mateo County

Counties: San Mateo

Optional Success
Story(ies)/Case Summary(ies)

1. Mr. and Mrs. T came into Legal Aid because they felt they had nowhere else to turn. Their son, who had been living with them, was making their lives unbearable. They had tried to get their son help, but his behavior was becoming more and more belligerent and scary. Both parents felt like they were being terrorized in their own home by their son's relentless verbal and emotional abuse. After years of dealing with this behavior, they finally decided that they needed some peace in their home and came to Legal Aid to pursue an elder abuse restraining order. The Seniors Advocates' attorney at Legal Aid agreed to represent them. She was able to get a temporary order with a move-out provision approved and at the hearing, they were granted a permanent restraining order for two years. It was an incredibly difficult decision for Mr. and Mrs. T to make, but they have both expressed that they feel safer in their home.

2. In late August, the brother of a 58-year-old woman, Ms. C, who was terminally ill sought our assistance to ensure his sister received in-home supportive services. By the time he came to Legal Aid, her illness had progressed to the point where she could barely move and no longer could speak at all. Although she was receiving some in-home care, Ms. C needed more help so she could remain in her home. She met the criteria for IHSS, but was not able to access the services because she had a Medi-Cal share of cost of almost \$800 per month. Legal Aid was able to guide Ms. C's brother through the process of eliminating her share of cost. Ms. C was able to access the much needed IHSS care that will allow her to remain in her home for as long as possible.

3. Ms. M came to us after she had been sued by a debt buyer on a credit card account. The suit sought approximately \$10,000, plus attorneys' fees and costs. The debt buyer had sued Ms. M - a San Mateo County resident - in Alameda County, though it had no legal basis to do so. Legal Aid filed a complaint on Ms. M's behalf, alleging that the debt buyer had violated Federal and California laws by suing Ms. M in Alameda County. The debt buyer agreed to resolve the matter by dismissing its collection suit with prejudice, saving Ms. M at least \$10,000.

Optional Information on
Collaboration with Other
Advocacy Groups

1. Adult Abuse Prevention Committee—Legal Aid continued actively participating in the AAPC, which has focused its efforts on continuing the successful Theatre of the Oppressed show, Making the Invisible Visible.

2. Health Plan of San Mateo and HICAP—Legal Aid has continued to work with HPSM and HICAP, especially on issues involving dual eligible consumers who are enrolled in the new Cal MediConnect health plan and those eligible for services through the Coordinated Care Initiative. To that end, Legal Aid is serving on the Cal MediConnect advisory committee.

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Provider: Legal Assistance for Seniors

Counties: Alameda

Optional Success
Story(ies)/Case Summary(ies)

Legal Assistance for Seniors successfully represented Mrs. W, an 81 year old widow from Taiwan, on her SSI Request for Reconsideration. Mrs. W's first language is Mandarin, she speaks minimal English, and her only source of income is SSI.

Mrs. W received notification from Social Security that in order for her SSI to continue, she needed to provide proof of her ineligibility for a Taiwanese pension. Upon receiving the notice from Social Security, Mrs. W filed her Request for Reconsideration within ten (10) days, which meant that under the law, she should continue receiving SSI payments while the case is pending.

Despite this, Social Security initially refused to continue Mrs. W's SSI, stating that a special form was required to request such payment continuation. By explaining the legal requirements for SSI payment continuation, Legal Assistance for Seniors' attorney Kate Rosenbaum was able to advocate for Mrs. W's SSI to continue, resulting in Mrs. W's SSI continuing for three additional months while the case was pending.

Legal Assistance for Seniors also worked with Mrs. W's family to obtain the proper documentation regarding the Taiwanese pension, which entailed Mrs. W's daughter making an in-person visit to the pension office in Taiwan. After submitting proof from the Taiwanese pension office that Mrs. W is ineligible for a pension, Social Security determined that Mrs. W's SSI will continue into the future.

Optional Information on
Collaboration with Other
Advocacy Groups

Legal Assistance for Seniors (LAS) works closely with Alameda County APS to serve clients suffering from or at risk for elder abuse by providing legal services for clients in need of legal advice and/or protections. LAS has also been awarded the Alameda County HICAP contract and provides HICAP counseling services as well as legal services for HICAP clients. LAS collaborates with the Contra Costa County HICAP program and provides legal services for clients referred to LAS by Contra Costa HICAP counselors. LAS also works with the Alameda County Ombudsman to serve clients in residential facilities. Additionally, LAS works with the Alameda County Department of Children and Family Services to serve clients needing assistance in obtaining legal guardianship of minors. LAS' is a participating agency in the Northern Alameda County Kinship Collaboration and provides legal services to relative caregivers of minors. LAS also maintain collaborative relationships with the State Bar of California and the cities of Alameda, Fremont, Hayward, Livermore, and Pleasanton to provide legal services to seniors as well as educational presentations and referrals to other community resources.

PSA: 10

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Provider: Senior Adults Legal Assistance (SALA)

Counties: Santa Clara

Optional Success
Story(ies)/Case Summary(ies)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

Collaboration with Senior Centers and Other Sites to Deliver Services
For the 1st Quarter of 2014-15, SALA provided on-site legal service intake appointments at 23 senior centers or sites in Santa Clara County. These sites included: These sites included: Avenidas Senior Center and Stevenson House (in Palo Alto), Mountain View Senior Center, Sunnyvale Community Services, Santa Clara Senior Center, Milpitas Senior Center, Cypress Senior Center (San Jose), Cupertino Senior Center, John XXIII Senior Center (operated by Catholic Charities in San Jose), Roosevelt Community Center (San Jose), Alma Senior Center (San Jose), Seven Trees Center (San Jose) Eastside Senior Center (San Jose), Campbell Adult Center, Willows Senior Center (San Jose), Camden Community Center (San Jose), Almaden Senior Center (San Jose), Saratoga Senior Center, Evergreen Senior Center (San Jose), Southside Senior Center (San Jose), CRC Senior Center (Morgan Hill), and Gilroy Senior Center. Staff at these sites scheduled SALA's appointments and the sites also provided a private interview room free of charge.
Participation on Local Task Forces
For the 1st Quarter of 2013-14, SALA attorneys also participated in the July meetings of the Domestic Violence Roundtable and the Elder Abuse Task Force.

PSA: 11

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Provider: Council for the Spanish Speaking

Counties: San Joaquin

Optional Success
Story(ies)/Case Summary(ies)

This past month, I was able to assist two clients from being victims of financial elder abuse. They were a married couple that came in with their caregiver to request power of attorney forms. I did not feel comfortable issuing them the POA's because the caregiver would not let them speak. The husband had limited speech, but expressed he wanted to have his niece as his POA. The caregiver followed up with me and provided me the niece's phone number. When I contacted the niece, she informed me that she had been trying to become their POA but the caregiver kept interfering.

I referred the niece to adult protective services. I followed up with APS and learned that an investigation had taken place on the same couple prior to this report but, it had been closed. The clients were referred to APS by their bank because the caregiver was pursuing them to take out a \$50,000 loan. The case was closed because the clients stopped pursuing the loan. When APS followed up with the clients and reopened the case, the caregiver attempted to harass the APS worker and the Manteca Police Department was contacted. The caregiver is no longer assisting the clients, and APS also found out that the caregiver had six different aliases in other states. There is a current ongoing investigation on the caregiver.

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 12

Provider: Alpine, Amador, Calaveras, Mariposa, Tuolu

Counties: Alpine, Amador, Calaveras, Mariposa, Tuolu

Optional Success
Story(ies)/Case Summary(ies)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 13

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Provider: Senior Citizens Legal Services

Counties: Santa Cruz County & San Benito County

Optional Success
Story(ies)/Case Summary(ies)

SCLS continued to provide high quality legal services to seniors who need adequate healthcare, housing, and income. The Third Quarter Report indicates that SCLS is on target to meet all of its contract goals in this regard.

SCLS continued in the 5th Quarter of a six Quarter grant collaboration with Watsonville Law Center, Legal services for Seniors (Monterey County), and Community Actions Board in implement the "Home Again" grant program helping Santa Cruz seniors to secure stable income and housing now and into the future.

SCLS represented two separate Seniors in receiving Elder Abuse Restraining Orders against parties. One was a daughter who was abusive and threatening the senior and her grandson who the client is the guardian. The second was protecting a client from an abusive son who was collecting rent from renting out the client's room in the clients home as the clients was away visiting southern California for two months. This restrained son had moved his father's possessions into a trailer on the property and locked the client from his own home. SCLS was able to get the client a restraining order and return control of his home to the client.

Optional Information on
Collaboration with Other
Advocacy Groups

SCLS collaborated this quarter with Ombudsman and Adult Protective Services and Meals on Wheel program to run an education on Elder Abuse for participants at a remote county location. This collaboration will continue at various other locations in the future.

PSA: 14

Provider: Central California Legal Services, Inc.

Counties: Fresno & Madera

Optional Success
Story(ies)/Case Summary(ies)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 15

California Legal Services (Title III B)
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Fiscal Year: 2014-2015

Quarter: 1

Provider: Central California Legal Services, Inc.

Counties: Tulare

Optional Success
Story(ies)/Case Summary(ies)

Senior client sought legal assistance for a lawsuit on outstanding credit card debt and advice on other consumer debts after client's income significantly changed. Advocate attorney advised client and contacted multiple creditors on client's behalf to inform them of client's situation and request that their representatives cease contact with client. The attorney also contacted the creditor that filed the lawsuit against the client and got the lawsuit dismissed.

Optional Information on
Collaboration with Other
Advocacy Groups

Last quarter, two CCLS attorneys in the service area attended a probate referee event that was well-attended by other professionals with senior clients and organized by the Tulare-Kings Estate Planning Council. In August, an attorney based in Visalia attended a trusts and estates conference in Los Angeles and networked with other elder rights advocates in the state. In September, another attorney in Visalia attended a September networking luncheon that was organized by the Kaweah Delta Community Outreach Department and included participation from local community organizations.

Provider: Kings

Counties: Kings

Optional Success
Story(ies)/Case Summary(ies)

Senior client, who was very ill and has now passed, faced a potential vehicle repossession due to a contract that he was fraudulently induced into signing. The attorney investigated the issue to discover the fraud and abuse and advised client accordingly. Additionally, the attorney contacted the company that was threatening repossession to explain the situation and demand reimbursement of client's payments. The company ultimately admitted contract was fraudulent and refunded all payments rendered by client.

Optional Information on
Collaboration with Other
Advocacy Groups

Last quarter, two CCLS attorneys in the service area attended a probate referee event that was well-attended by other professionals with senior clients and organized by the Tulare-Kings Estate Planning Council. In August, an attorney based in Visalia attended a trusts and estates conference in Los Angeles and networked with other elder rights advocates in the state. In September, another attorney in Visalia attended a September networking luncheon that was organized by the Kaweah Delta Community Outreach Department and included participation from local community organizations.

PSA: 16

California Legal Services (Title III B)

PSA Level Quarterly Narrative Report

Fiscal Year: 2014-2015

Quarter: 1

Provider: California Indian Legal Services

Counties: Inyo & Mono

Optional Success
Story(ies)/Case Summary(ies)

Client Story #1: An elder client came to us in September with a notice for a Social Security over payment of \$5,293. The client had drawn down from her Social Security retirement early and was still subject to the Earnings Test. The Earnings Test has a maximum earnings limit that when an individual goes beyond it their Social Security benefit is offset one dollar for every two dollars earned. Our client believed that the Earnings Test had a much higher limit and had earned too much income. Social Security threatened to withhold the client's Social Security benefits entirely due to the alleged overpayment beginning in November. We assisted the client by quickly drafting and submitting a waiver request to Social Security that would allow the client to keep her Social Security benefits and not have it withheld until a decision was made on the overpayment waiver request we submitted. This was vital to the client as her only source of income is from her Social Security benefits in the amount of \$661 per month.

Client Story #2: A 72 year old elder client came to us after being served a summons and complaint regarding a credit card debt of \$4,903 and was very concerned given his current financial situation. The client did not have any real assets as his source of income is Social Security and per capita. The client stated that he was responsible for the debt and wanted to pay it, but didn't know how he was going to pay it off given his limited income. He explained that he also had other income that he earned at \$75 per month by selling jams and peppers to try and earn extra money for food. We reviewed the client's documents and advised him not to respond to the complaint so that it wouldn't result in additional attorney's fees on the behalf of the credit card company. After a thorough review, we also advised him that he was judgment proof, as his property and income are considered exempt from judgment. We further advised that the tribe would not garnish his per capita payments as they are protected under 42 USC section 407. This code states that Social Security retirement is protected from any judgment under federal law, and under California law (Code of Civil Procedure) up to \$2,425 of his social security retirement is protected once direct deposited in his bank account. Once we advised the client that he was judgment proof and these exemptions were there for a reason and that was to protect indigent individuals and their income to provide basic living necessities, he was very relieved and thankful for our legal assistance.

Optional Information on
Collaboration with Other
Advocacy Groups

With a new focus for the ESAAA contract for the IMSLP being on community education, self-help materials and referrals, CILS has coordinated with statewide Legal Service Support Centers and other Title III Legal Services in order to obtain information on their services and gather materials. The Title III Program Director from Northern California Legal Services was very helpful in sharing information on Durable Powers of Attorneys and Advance Health Care Directives used by their program, as well as, outreach methods used to reach their target community. CILS also interacted with the CCWRO regarding services they provide, including direct representation on public benefit cases and materials available on consumer protection. CCWRO offered materials on responding to harassing debt collection agencies and sample letter to such agencies to stop their practices. The CA Advocates for Nursing Home Reform (CANHR) was also contacted and approved the use of their materials and referral list to private legal counsel with background on estate planning with a Medi-Cal overlay. Yvette Mason,

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2014-2015

Quarter: 1

Veteran Service Representative also provided materials used by the VA.
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PSA: 17

Provider: Not Provided

Counties: San Luis Obispo

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

The Project Director attended the AAPC/FAST committee meeting in July and August. The Project Director attended a state-wide meeting of SLSP (as well as representatives from other agencies and non-profits who serve seniors) for training on elder abuse TROs, information on Senior Hotline, collaboration and networking. The meeting was hosted and organized by Legal Aid Association of California. The Project Director met with Victim Witness Assistance advocates Kelly Sexton and Angela Viles to begin planning a presentation on elder abuse to be jointly presented to seniors in the community.
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PSA: 18

Provider: Grey Law of Ventura County Inc.

Counties: Ventura

Optional Success
Story(ies)/Case Summary(ies)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 19

Provider: Bet Tzedek

Counties: Los Angeles

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 20

California Legal Services (Title III B)
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Fiscal Year: 2014-2015

Quarter: 1

Provider: Inland Counties Legal Services, Inc.

Counties: San Bernardino

Optional Success
Story(ies)/Case Summary(ies)

Case #1: 14E-7005804

ICLS's client is an 83-year-old frail senior living alone. She retired in 1998 and received full benefits from her employer's pension plan. As part of her retirement benefits, she has private health insurance for the rest of her life. For the month of July her pension was reduced by \$104, per the retirement plan is because she is not enrolled in Medicare. The client had always been told by the retirement plan not to enroll in Medicare, as it would conflict with her private insurance provided by her plan. Now she feels that she is being penalized for following what her pension plan instructed her to do. ICLS agreed to review the plan benefits and advise her regarding her right to a refund of the \$104 deduction. The client is very thankful that ICLS will be assisting her regarding this deduction since she is on a fixed income and this deduction has caused her a financial hardship.

Case #2: 14E-7006193

An 80-year-old monolingual Spanish-speaking widow requested ICLS assistance in having her Will prepared. The client has eleven biological children; one of them is severely disabled and unable to care for himself. Due to her age and medical condition, she is no longer capable of caring for her son and one of her daughters has assumed the responsibility. The client wants to make sure that her disabled son is cared for when she is gone and wants to leave her home and all her belongings to the daughter who has promised to continue to care for him. The advocate advised the client that leaving her belongings to her daughter will not guarantee that her son would be cared for. After discussing the client's issue with the managing attorney, it was determined that the advocate should advise the client to consider a Special Needs Trust instead of a Will. The advocate left a message for the client to contact her and translated the advocate letter that had been prepared by the managing attorney from English to Spanish and sent it to the client. When the client returned the advocate's call, the advocate advised her that the Special Needs Trust would be the best estate-planning tool to ensure that her son would be taken care of. The advocate also red (in Spanish) the advice letter that had been sent to the client. The client was so grateful for the time and consideration ICLS gave to her concerns and for the advice she had been provided with. When she was informed that ICLS would not be able to assist her in preparing a Special Needs Trust she fully understood and was still very grateful.

Case #3: 14E-6006818

The client, a very elderly lady, returned to the ICLS advocate who had prepared a will for her for additional advice. She was concerned about her home. She still owed a mortgage, though not a large one, and has manageable monthly payments. She was contemplating "going around the will" by adding a relative to the title.

The advocate advised the client that the way to transfer property is by will. This ensures that she has the home to live in for the rest of her life. He advised that she should not change the title- it should be kept in her name alone. The client seemed to understand that changing the title was not a good idea at this time and furthermore, the lender might take issue with her changing the title since it had been recently refinanced.

Case #4: 14E-7007011

ICLS's client, an 84-year-old divorced disabled senior requiring oxygen 24/7, requested assistance in

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Fiscal Year: 2014-2015

Quarter: 1

early August. The client had never used ICLS services before and had been referred by her senior center. The client receives SSA and a small pension from Hemet Hospital where she had worked as a nurse. She wanted counsel and advice to see if she was eligible for any benefits that would help her pay for her medications. The advocate advised the client that she should apply for Medi-Cal to see if she is found eligible. If she is denied, she should call back to have the advocate review her documents to verify if she is or is not eligible for Medi-Cal. The advocate also advised the client that because she currently has Medicare Advantage with Scan she might be eligible for Medicare "Extra Help" which would assist her in paying for her medical expenses and that she should contact HICAP for counseling. The client contacted the advocate later in the month to thank her for the advice and information that she had been provided with because when she looked into Medicare "Extra Help" she found that she was eligible. She will now be receiving a lot of help in paying for her medication. The client was very grateful to ICLS for being able to assist her free of charge.

Case #5: 14E-7008876

The client, a senior in extremely poor health, contacted ICLS for help in enforcement of her spousal support orders. She had received sporadic payments and now her ex-husband has stopped making any payments. The advocate advised the client that she may have options against the property he owns in another state but that she will need to seek assistance from that state on how to encumber the property. The advocate also advised the client of her options and the potential pitfalls of filing to enforce her current order as her ex-husband could request termination of the supp011. Prior to filing, the advocate advised the client to check her status as a wife with Social Security and determine if her ex-husband is receiving social security yet. The advocate committed to the client that ICLS would assist her to establish arrears and assist her in getting her support order in place with Social Security and if necessary, prepare an Abstract of Judgment to encumber his property. The client was grateful for the advice and will return when she has the needed information.

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 21

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2014-2015

Quarter: 1

Provider: Inland Counties Legal Services, Inc.

Counties: Riverside

Optional Success
Story(ies)/Case Summary(ies)

Case #1: BE-2009409

The client was receiving food stamps and had failed to report that she was also working, not just collecting social security. The County charged her with an overpayment of \$2,400. The ICLS advocate represented the client at three hearings. The County finally agreed that the client was not given all the deductions she could have been given (shelter, medical costs, etc.) The County had reduced the overpayment down to \$952. They will now reduce it further. The client is very happy to have the overpayment reduced. Additionally, the County categorized this as a household error and not a deliberate program violation, which is very important and means that there will be no future criminal charges against the client. The advocate had the client re-apply for food stamps (she had gotten scared and canceled her food stamps when the fact came out that she was working which she no longer is doing). The advocate also got the County to rescind their action attaching her social security. The social security is no longer being attached and the County further agreed to collect the overpayment via a reduction in her current benefit by \$10.

Case #2: 14E-2006028

The senior client sold her car to someone she had met at a bus station. By written agreement, the buyer was to make payments for 6 months and then title would be transferred to his name. The buyer only made partial payments over a period of 10 months and then reported to the client that the car had been stolen. The client called to police and reported the car as stolen. When the police stopped the car and attempted to arrest the buyer he explained that he did not steal the car and that he had a legitimate sales agreement and was making payments. The police impounded the car and put a hold on the registration and were investigating whether the client had made a false auto theft claim or not. The client asked the ICLS advocate to contact the police and see if she could get her car back. The advocate contacted the police detective and explained that the buyer had reported to the client that the car was stolen. The police believed the client's story and returned the car to her without charging her any impound fees.

Case #3: 14E-4006674

ICLS assisted a 69-year-old disabled woman with the Cal-Fresh State Hearing process. The advocate requested that Riverside County recalculate the client's food stamps benefits because they had not taken into consideration all of her medical related expenses including her service dog cost. Thanks to ICLS advocacy, the client's Cal-Fresh benefits will be recalculated to give her the appropriate deductions retroactive to June 1, 2014. The County acknowledged that a disabled individual qualifies to have deducted from their monthly income their medical expenses including the cost of a service dog. Although the case had been accepted for representation at the hearing level, there was no need to appear before an Administrative Law Judge since the County offered a Conditional Withdrawal, which is actually a settlement of the case. The client will, from now on, be able to report to her Cal-Fresh worker with confidence her medical expenses using the "Food Stamp Supplemental Application for Special Medical Deductions" form.

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PSA Level Quarterly Narrative Report

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Quarter: 1

Case #4: 14E-4007085

The client, a 73-year-old man whose only source of income is SSA and SSI, came for help because he had received a notice of a pending lien sale for a vehicle valued at \$4,000 or less. His car had been stolen in March of 2014 and was found by police in July 2014 and towed. The client stated that the car had been stripped of everything and only the shell was left. The impound company is charging him \$1,335 to take the auto but it does not have a value even close to that amount. The client did not have full coverage insurance and so he is responsible for this amount. He is worried that after the sale is conducted and if a balance is left then the towing company will come after him. The advocate advised the client that his SSI and SSA monies were exempt under the California Code of Civil Procedures Section 704.080, as long as he doesn't have more than \$2,425 in his bank account. The advocate also advised the client against comingling his funds. He was worried about his credit and the advocate explained that his credit could be affected if he was sued or a debt was reported to credit agencies. He was relieved when he found out that his monies were exempt.

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 22

Provider: Legal Aid Society Of Orange County

Counties: Orange

Optional Success
Story(ies)/Case Summary(ies)

We obtained two favorable administrative decisions this quarter. In one, a client's application for SSI benefits had been denied. We assisted the client at our SSI Clinic to appeal and advised him on how to submit additional evidence of his condition. On appeal, at the Reconsideration stage, Social Security determined that the client is eligible for SSI. He will now receive monthly benefits and a retroactive award of \$2,600, covering the months since he applied for SSI. In a second decision, we represented a client who had received a notice that his housing rental subsidy would be terminated. We represented the client at the administrative hearing and received a favorable decision allowing client to continue to receive his rental subsidy.

Optional Information on
Collaboration with Other
Advocacy Groups

This quarter we worked with the Court, local law schools, private attorneys and community partners to establish an Elder Abuse TRO Clinic, held at the court twice each week. The Clinic is staffed by volunteer law students and attorneys. The Clinic is held every Tuesday and Friday, from 9-1, at the court. Persons attending the Clinic receive information about TRO's and assistance with completing necessary pleadings and declarations. The first Clinic session was held September 16th.

PSA: 23

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2014-2015

Quarter: 1

Provider: Elder Law & Advocacy

Counties: San Diego

Optional Success
Story(ies)/Case Summary(ies)

An 84-year-old low income and disabled senior entered a contract with a shipping company to ship a box overseas. While in route to its destination, the box was destroyed by accident. Elder Law & Advocacy's attorney contacted the shipping company on the senior's behalf and wrote a demand letter. Company promised \$500.00 compensation for the contents of the box but did not send compensation as promised. The attorney followed up with the shipping company. Shipping company sent two checks of \$250.00 each. The senior was grateful for our services.

Optional Information on
Collaboration with Other
Advocacy Groups

NOT APPLICABLE FOR THIS QUARTER.

PSA: 24

Provider: Elder Law & Advocacy

Counties: Imperial

Optional Success
Story(ies)/Case Summary(ies)

NOT APPLICABLE FOR THIS QUARTER

Optional Information on
Collaboration with Other
Advocacy Groups

NOT APPLICABLE FOR THIS QUARTER

PSA: 25

Provider: Bet Tzedek

Counties: Los Angeles City

Optional Success
Story(ies)/Case Summary(ies)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 26

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2014-2015

Quarter: 1

Provider: Legal Services of Northern California

Counties: Mendocino & Lake

Optional Success
Story(ies)/Case Summary(ies)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 27

Provider: Council On Aging

Counties: Sonoma

Optional Success
Story(ies)/Case Summary(ies)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

Collaboration with COPA – (Collaborative on Positive aging) “Planning for your Longevity” – a 12 month workshop series for developing a personal plan for aging well.
2 events were held:
1)September 10, 2014 – Petaluma Community Health Center, 1425 N. McDowell Blvd, Petaluma
2)September 16, 2014 – Sharespace, 533 5th Street, Santa Rosa,
PRESENTATION: “Legal Issues and Empowering Choices”, a multidisciplinary seminar with speakers Paul Miller, Esq. and Laura Butera, Financial Case Manager, both from Council on Aging. Topic: Legalities and End of Life decisions. Participants will gain a working knowledge of the types of legal documents needed as we age, gain understanding of the many choices surrounding end of life, prepare to begin making choices for themselves and learn how to open the discussion with older family members.

PSA: 28

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2014-2015

Quarter: 1

Provider: Legal Services of Northern California

Counties: Solano

Optional Success
Story(ies)/Case Summary(ies)

1) A mobile home park attempted to evict a disabled veteran from the space that he rented. He purchased the home for \$10,000 and he has rented the space for over 10 years. The veteran suffers from severe back pain. Because of his condition, he could not keep the area around his home clean, which was a violation of park rules. He attempted to clean his lot, but was admitted into the hospital before he could finish. After he returned from the hospital, he found a notice stating that his tenancy would be terminated in 60 days.

Because he only receives a small government benefit, he could not afford to move his home from the lot. If he could not find a way to fight this eviction, he would lose his entire investment and become homeless.

LSNC submitted a request to the park to dismiss the eviction and allow him more time to clean his lot. We argued that because of his disabilities the park must adjust its rules in order to accommodate his condition. After intense negotiations, we reached a settlement with the park. The senior was given the time to clean his space. The park dismissed the eviction. As a result of our advocacy, we preserved his home and prevented another veteran from becoming homeless.

2) A landlord filed an eviction against a woman who was a victim of domestic violence. The woman's son was the perpetrator and he would come to her apartment unannounced. He would yell at her, and in some instances, he would become violent. Although the woman was the victim in this matter, the landlord wanted to evict her because of all the trouble her son was causing. The landlord intimidated the woman into signing a move out letter. However, when the woman refused to leave, the landlord filed an eviction.

LSNC defended the woman in court. We argued that the notice was invalid and that the landlord could not evict a victim of domestic violence. We negotiated a settlement where the woman could remain in her apartment and the landlord would dismiss the case. Due to our advocacy, we prevented her landlord from persecuting her for her son's horrible actions. She no longer has to feel at fault for being a victim.

Optional Information on
Collaboration with Other
Advocacy Groups

Continued collaboration with Ombudsman Services of Northern California and Senior Legal Hotline.

Continued participation with community groups including: Solano Senior Coalition and Vallejo Senior roundtable.

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PSA Level Quarterly Narrative Report

Fiscal Year: 2014-2015

Quarter: 1

Provider: Legal Aid of Napa Valley

Counties: Napa

Optional Success
Story(ies)/Case Summary(ies)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

Legal Aid of Napa Valley continues to work with One Justice to provide free legal services in the area of estate planning. The clinics are four hours long and we are able to prepare and notarize Power of Attorneys for Finance and Health Care Directives. We also obtain information to prepare simple wills. On July 14, 2014, in St. Helena and in Yountville, we were able to assist 26 seniors, with the majority being low income and several Spanish speaking.

PSA: 29

Provider: Senior Legal Services

Counties: El Dorado

Optional Success
Story(ies)/Case Summary(ies)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 30

Provider: Dor v' Dor Senior Advocacy Network

Counties: Stanislaus

Optional Success
Story(ies)/Case Summary(ies)

Negotiated with landlord to get ac fixed in middle of heat wave;
Numerous successful elder abuse cases resolved with restraining orders;
Partnered with outside counsel to file financial abuse lawsuit against major assisted living/rehab facility.

Optional Information on
Collaboration with Other
Advocacy Groups

We continue to work closely with the Ombudsman office and APS on elder abuse cases occurring in assisted and skilled nursing facilities.

We are getting a lot of requests for speaking engagements that target smaller groups on specific senior issues. We have been trying to educate seniors on how to execute a proper Power of Attorney and how to protect themselves from abuse when making them.

PSA: 31

California Legal Services (Title III B)
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Fiscal Year: 2014-2015

Quarter: 1

Provider: Central California Legal Services

Counties: Merced

Optional Success
Story(ies)/Case Summary(ies)

July 2014

CCLS Case No. 14E-3003210 ELDER FINANCIAL ABUSE

Client, an 84-year-old homebound Atwater woman was referred to CCLS by the Office of the LTC Ombudsman. Client stated that her son in Virginia has authority to act on her behalf under a financial power of attorney, but that she did not remember ever signing it, and did not want that son having access to her resources. The Son has threatened to sell Client's house in Virginia and "put her in a home." Attorney visited Client at her home in Atwater. After meeting with and interviewing client, Attorney drafted a Revocation of the son's authority under the power of attorney. Attorney then returned to the home, obtained Client's signature, notarized the document, and sent it out to Client's financial institutions, as well as her son. Attorney then assisted client in making a new power of attorney appointing her other two children as agents.

CCLS Case Nos. : 14E-E3001493 CREDITOR HARASSMENT

Client an 84-year-old Merced woman, contacted CCLS for assistance with responding to a letter she received from a debt collector. Attorney had contacted this collector last year and demanded verification of the alleged debt. Upon examination of the documentation provided by the collector, it appeared as though the debt is time-barred by the relevant statute of limitations for delinquent debt. Collector has since ceased contacting client.

On July 19, 2014, Attorney was contacted by reporter Ana B. Ibarra with the Merced Sun-Star. Attorney agreed to a phone interview about phone scams targeting the elderly. Attorney discussed the types of phone scams encountered by Merced seniors clients, why the senior community is particularly vulnerable, and how seniors should respond to anyone calling them asking for money (don't give it to them and hang up, talk to a friend or family member if they feel like the call might be legitimate). Some of the information from Attorney's interview made it into the July 19, 2014, issue of the Sun-Star, in an article entitled "Phone scam targets elderly."

August 2014

CCLS Case No. 14E-3003815 ELDER FINANCIAL ABUSE

Client, a 93 year old homebound Planada woman contacted CCLS after receiving several harassing phone calls from her daughter. Client's son had recently died, and her daughter's calls were especially disturbing. Attorney agreed to represent client in court to get a restraining order prohibiting the harassing phone calls. Attorney drafted and filed necessary papers with Merced Superior Court to obtain a temporary restraining order prohibiting the offensive phone calls. At the hearing, Client and her daughter were able to reconcile. Daughter has agreed to treat Client with respect, and Client agreed to allow the restraining order to terminate.

September 2014

CCLS Case No. 14E-3003815 – CREDITOR HARASSMENT

Client, a 62 year old limited-English Los Banos man contacted CCLS after being sued by a debt

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2014-2015

Quarter: 1

collector for about \$6,000 of old credit card debt. Attorney met with client, and agreed to represent him in the lawsuit to protect his credit rating, so that he would encounter less difficulty finding an apartment when he can no longer make payments on his upside-down home mortgage. Attorney then answered in the lawsuit and propounded initial written discovery on the debt collector. Upon learning that the Attorney was prepared to represent client at trial, free of cost to him, counsel for the debt collector promptly discharged client from any debt obligation and dismissed the lawsuit.

CCLS Case No. 14E-3004764 – ELDER ABUSE

Client, a 68-year-old Merced man contacted CCLS, claiming that his son-in-law (who lives in the home with him) is on drugs, and has threatened and abused him physically. Client told attorney that he was in the process of moving out of the home, but that he was afraid for his safety in the meantime. Attorney agreed to represent client in court to obtain a restraining order against his son-in-law. Attorney then applied for and obtained a temporary restraining order prohibiting any further harassment from the son-in-law. The temporary order lasted long enough for client to close on an apartment and move out of that house.

CCLS Case No. 14E-3003648 – ELDER FINANCIAL ABUSE/FAMILY LAW

Client, 72-year old limited-English Livingston woman contacted CCLS, asking for assistance in removing her daughter and grandchildren from her home. Client allowed her daughter and three grandchildren into her home after the daughter fell on hard economic times in 2013. Since then, the daughter has not contributed to the maintenance of the home or care of her children, has not been diligently looking for a job, and was verbally abusive. Client could not provide for her daughter and three grandchildren, as she is elderly and on a fixed income. Client had asked her daughter to move out several times and the daughter responded with threats of violence against the grandchildren. Attorney agreed to initiate eviction proceedings against daughter and grandchildren, but only as a last resort. With client's authorization, attorney contacted Merced County APS and CPS and reported the treats made to client's grandchildren. After this did not resolve the issue, Attorney (with client's authorization) contacted the daughter directly to discuss the consequences of noncompliance with client's request. After the discussion, the daughter voluntarily moved out of client's home.

Optional Information on
Collaboration with Other
Advocacy Groups

September 2014

CCLS Case No. 14E-3005050 – ELDER FINANCIAL ABUSE

Client, a 63-year old Merced woman, was referred to Attorney from the CCLS Health Law Advice Line in Fresno. Client had questions about her power of attorney, and the case was flagged for potential elder financial abuse. After some attempts, Attorney was able to reach client by phone. Client told Attorney that there was no financial abuse going on, but that she was feeling lonely and depressed. With client's consent, Attorney made referral to PEARLS caseworkers.

PSA: 32

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2014-2015

Quarter: 1

Provider: Legal Services for Seniors

Counties: Monterey

Optional Success
Story(ies)/Case Summary(ies)

LSS has a pro bono attorney who volunteers his time to us (apart from his full-time job in another profession). Two months ago a client called us and after our first interview, we determined she was a financial elder abuse victim who had lost her home to an unscrupulous team of real estate broker/agent. Our 78-year old client came to us after she had signed over her home to a real estate agent who convinced her to enter into a "partnership agreement" with him to sell her home. After she signed the agreement, the real estate broker then convinced the client to sell her home (which she owned with no mortgage) to the broker because the "partnership wasn't working out, the market was bad and so let's have you sell me the house for \$137,000 "just to get things started"" (of course, the home's fair market value was \$250,000 - \$289,000). These cases, time-intensive and detailed, required our pro bono attorney to dive in, write a complaint (lawsuit) ready to be filed, and then when the bad-acting broker heard LSS was helping our client, he began calling us trying to say there had been a "misunderstanding" and he was fully planning to pay our client all her money. Our pro bono attorney said that was a fair trade for our not filing a suit and within a week, the broker had driven from his office in Fresno to ours, signed appropriate documents and opened an escrow for our client for the full amount to which she was entitled. Without the assistance of this private attorney who donated all his time with us, our client would have been left truly homeless and financially wiped out.

Optional Information on
Collaboration with Other
Advocacy Groups

Legal Services for Seniors continued to collaborate with the Alliance on Aging, the Area Agency on Aging, Watsonville Law Center and other agencies and organizations.

We are talking now with Loaves, Fishes & Computers about collaborating for a "senior tech" project. Our idea is to educate seniors first about the legal pitfalls of internet scams, how to use the internet for Social Security and Credit review and then work with LF&C on general internet literacy. This collaboration will balance on our ability to find new funds for the program in the coming months.

PSA: 33

Provider: Greater Bakersfield Legal Assistance, Inc.

Counties: Kern

Optional Success
Story(ies)/Case Summary(ies)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated